GrowthZone: M1 Daily Activities

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Overview

The GrowthZone integration with the National Association of REALTORS' NRDS/M1 database provides association staff an easy way to manage their contacts' NRDS/M1 data adding and updating in GrowthZone then syncing those records to M1.

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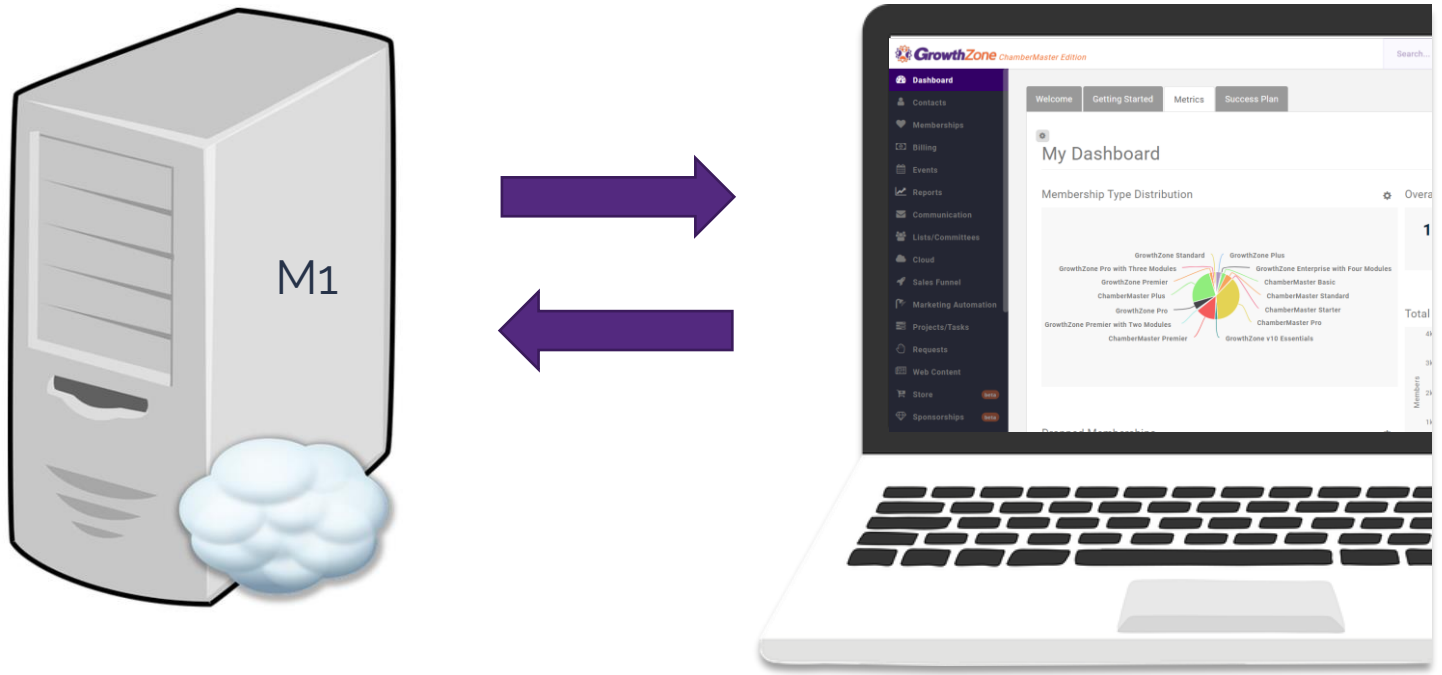
Overview

Data entered or changed in GrowthZone is automatically pushed to M1, thereby updating agent and office records from one central location.



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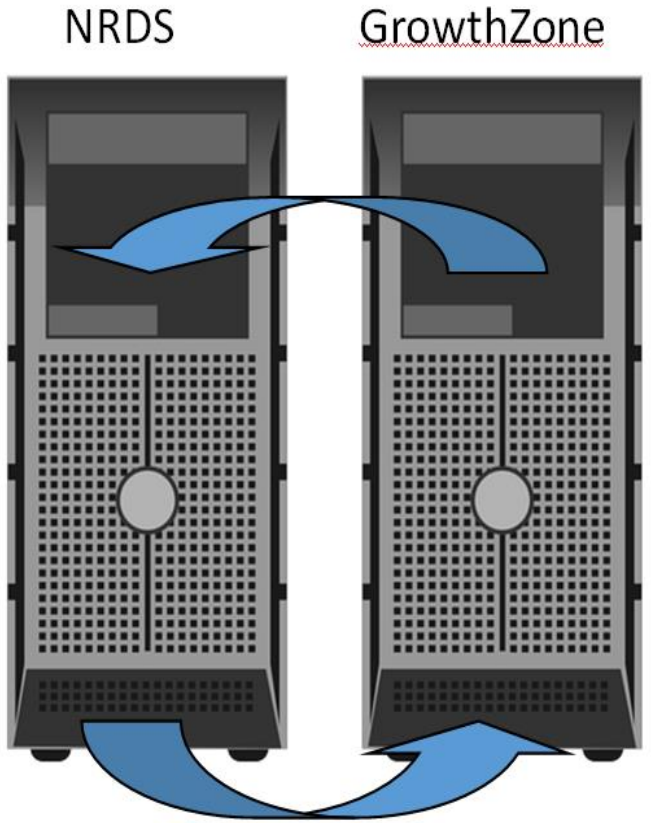
2 Way Sync

Within the NRDS/M1 system, there is a “sub queue” that enables NRDS/M1 to exchange information with GrowthZone.

A sub queue is maintained for each POE.



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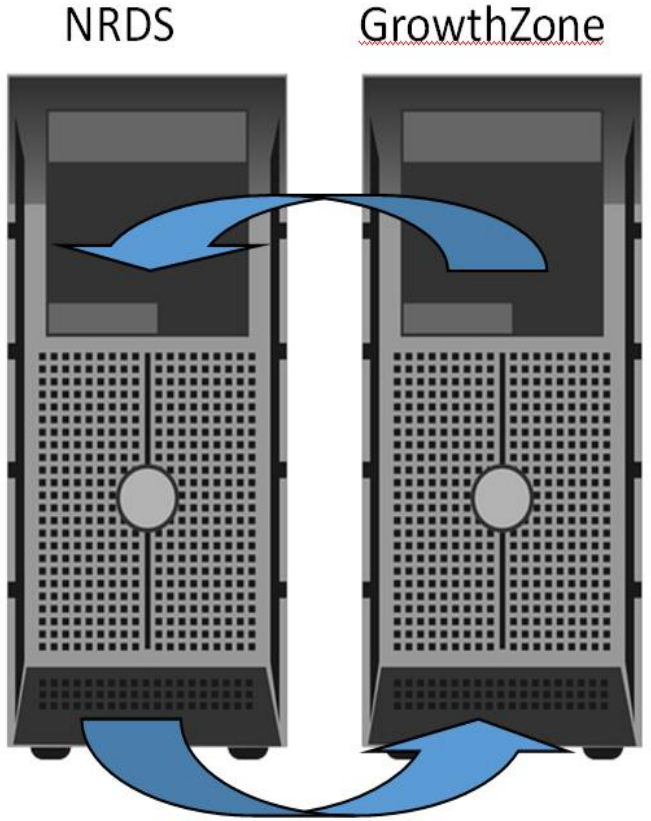
2 Way Sync

- ✓ Every add/change that occurs in NRDS/M1 that is "of interest" to this POE but not done by them publishes in this sub queue
- ✓ Every 5 minutes, GrowthZone will check the sub queue and update the GrowthZone records
- ✓ KB: NRDS/M1 Sub Queue Processing



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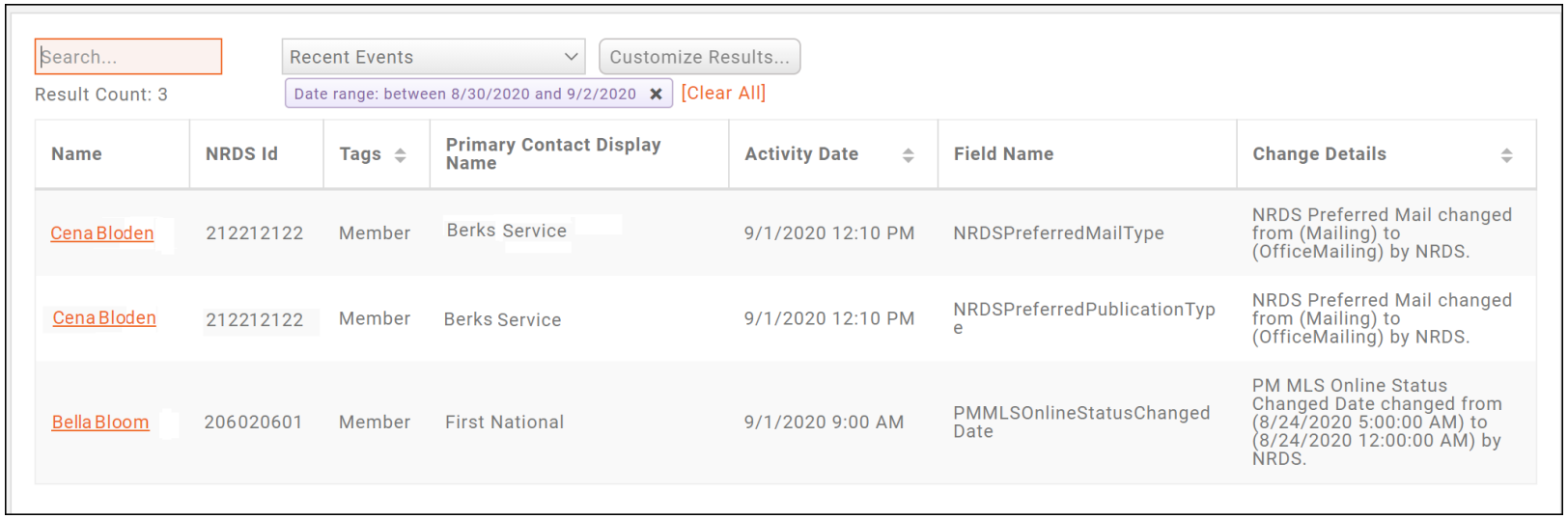
2 Way Sync

Once the sync is live, no interaction is required on your part to gather changes from the sub-queue. Every 5 minutes, GrowthZone will check the sub-queue for updates. This ensures that GrowthZone and NRDS/M1 are always in sync.



Name	NRDS Id	Tags	Primary Contact Display Name	Activity Date	Field Name	Change Details
Cena Bloden	212212122	Member	Berks Service	9/1/2020 12:10 PM	NRDSPreferredMailType	NRDS Preferred Mail changed from (Mailing) to (OfficeMailing) by NRDS.
Cena Bloden	212212122	Member	Berks Service	9/1/2020 12:10 PM	NRDSPreferredPublicationType	NRDS Preferred Mail changed from (Mailing) to (OfficeMailing) by NRDS.
Bella Bloom	206020601	Member	First National	9/1/2020 9:00 AM	PMMLSOnlineStatusChanged Date	PM MLS Online Status Changed Date changed from (8/24/2020 5:00:00 AM) to (8/24/2020 12:00:00 AM) by NRDS.

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What is “of interest”?

- Agent: Adds, changes and transfers. These are published to the sub queue of the member's primary and secondary local and state associations. Transfers are published to the subqueue of the agent’s original POE. See Agent Data
- Office: Adds, changes and transfers. Changes are published to the sub queue of the office's primary and secondary associations. Add Offices are published to the sub queue of the office's primary association. Transfers are published to the subqueue of the office’s original POE. See Office Data

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What is “of interest”?

- Education: Adds and changes. These are published to the sub queue of the member's primary and secondary associations. GrowthZone currently only processes the COEC/COEN (Code of Ethics) certifications. See Code of Ethics Data
- Agent Secondary: Adds and changes. These are published to the sub queue of the member's primary association. See Secondary Agent Data
- Office Secondary: Adds and Changes. These are published to the POE sub queue of the office's primary local and state associations. See Secondary Office Data

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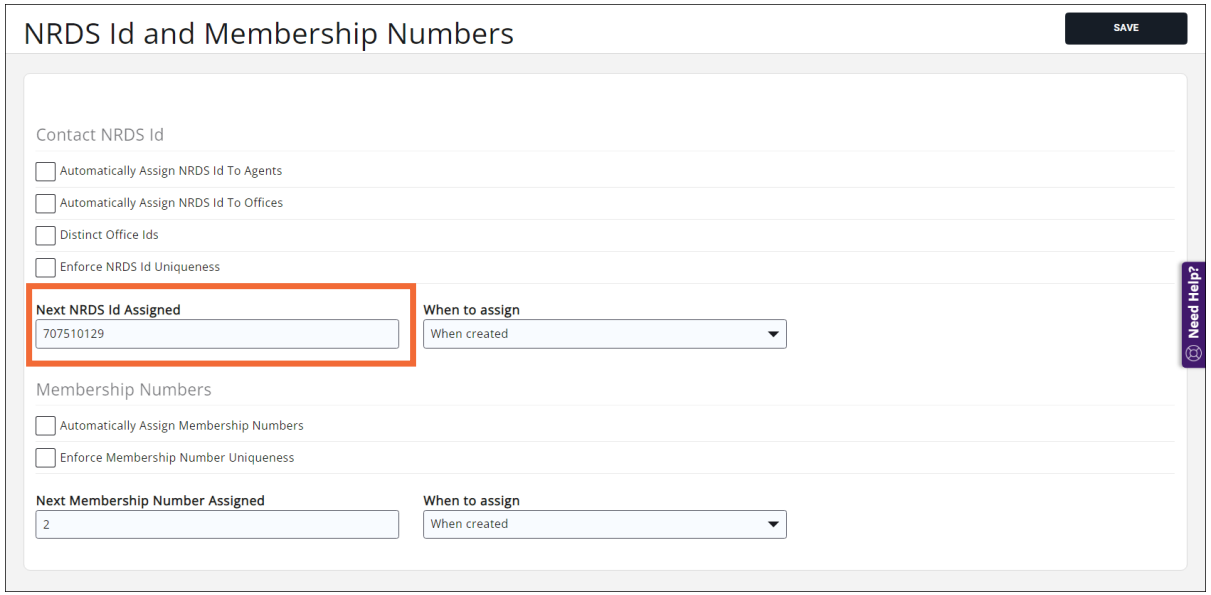
Setup Considerations – NRDS/M1 ID

If you are the POE for an agent or office, you will have the ability to assign unique NRDS/M1 ID's.

To ensure that you continue your sequence of ID's, GrowthZone will set your starting number. At go live, your project manager will ask for the next NRDS/M1 ID in your sequence.



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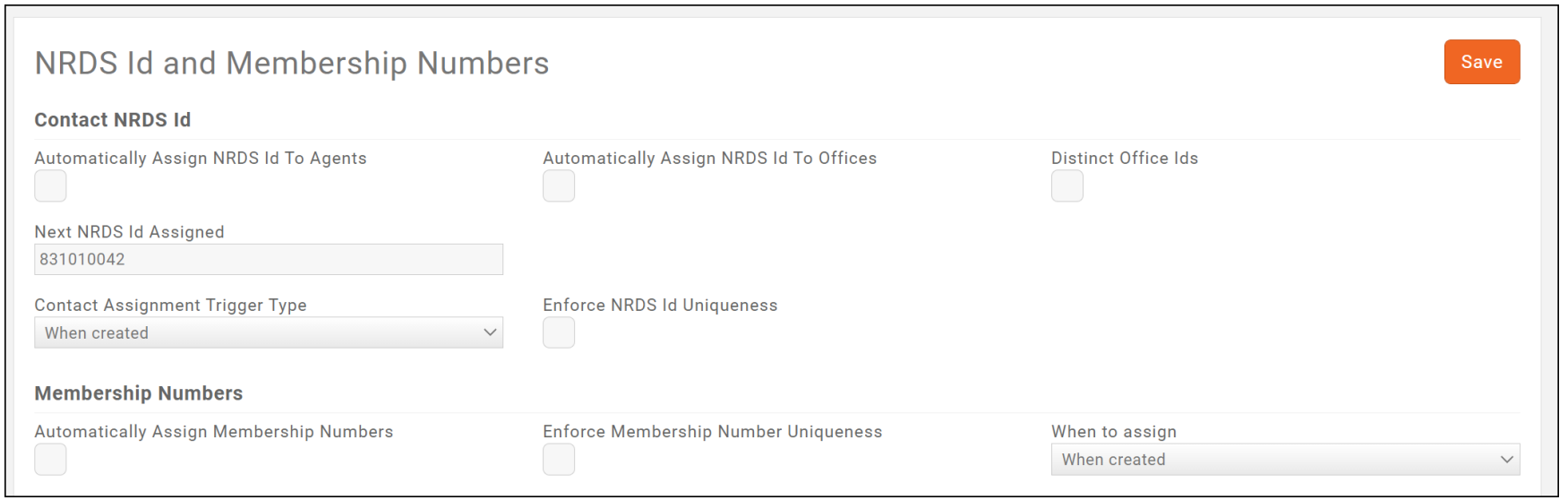
Initial Setup Considerations

If you are using NAR Ecommerce you will configure a default NRDS/M1 Id to be used when a payment is processed for a contact who does not have a NRDS/M1 ID



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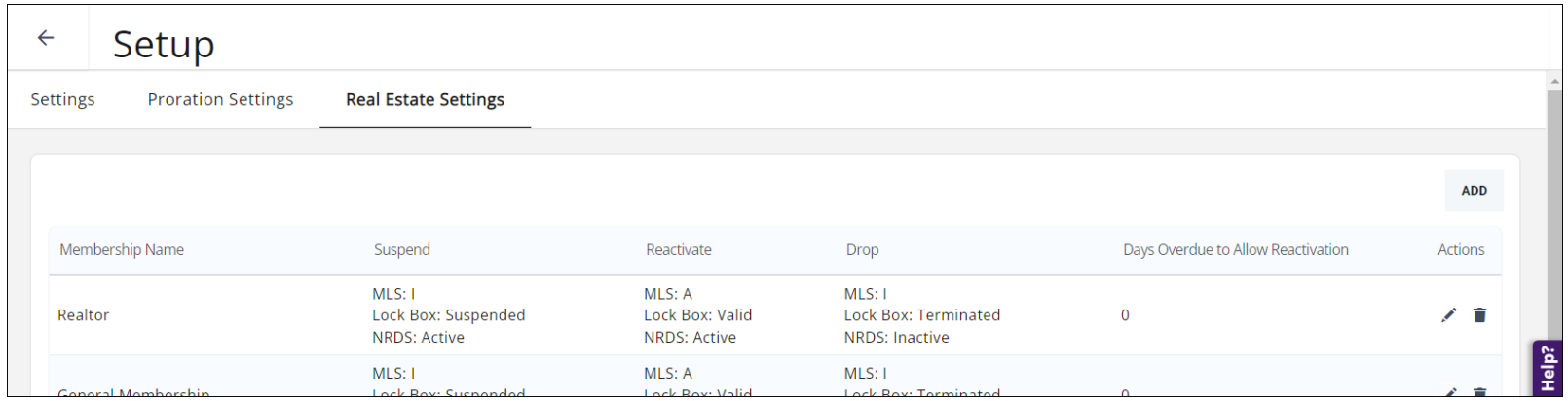
Initial Setup Considerations

Do you wish to tie Membership Status to NRDS/M1 Status?

- If you wish the system to automatically update the NRDS/M1 status when membership is dropped, suspended or reactivated you will do this during initial setup
- Best Practice – test this out in staging or clone first



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Daily Activities

- ✓ Add/Activate a New Office/New Agent
- ✓ Transfer an Agent to Your Board
- ✓ Enter an Agent as a Secondary Member
- ✓ Change an Agent Contact Information
- ✓ Link a Broker to Another Office
- ✓ Transfer an Agent to another Office
- ✓ Inactivate an Agent/Office in NRDS/M1
- ✓ Enter Code of Ethics Training
- ✓ Tracking Activity and Reports

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Add Offices to NRDS/M1

Follow the rules!

- A DR is required when entering an office in NRDS/M1. And a DR must be associated to an Office before it can be entered into NRDS/M1 ☹.
- Point of Entry (POE) restrictions apply. Only the POE can add or change an office.
- If a records already exists in NRDS/M1 and you are attempting to add, NRDS/M1 will process this as a Change
- Ensure all required fields are populated, and formatted correctly

GrowthZone simply passes data on… you must follow the same rules you would follow if you are entering offices directly into NRDS/M1. KB: Data Sent to NRDS/M1 for Offices

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Add Agents to NRDS/M1

Follow the rules!

- For R and RA – licenses are required, this is populated on the agent's Profile tab
- Point of Entry (POE) restrictions apply.
- You can not sync records to NRDS/M1 if the agent is inactive in NRDS/M1.
- If a records already exists in NRDS/M1 and you are attempting to add, NRDS/M1 will process this as a Change
- Ensure all required fields are populated, and formatted correctly
- Agents cannot be sent as "orphans" where they are not attached to any office.

GrowthZone simply passes data on… you must follow the same rules you would follow if you are entering agents directly into NRDS/M1. KB: Data sent to M1 for Primary Agents

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New Office/New Agent

Adding a new office & a new agent introduces a unique scenario where the office must exist to add the agent, and the agent must exist to add the office ☹

Which came first… the chicken or the egg?

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Add a New Office/New Agent

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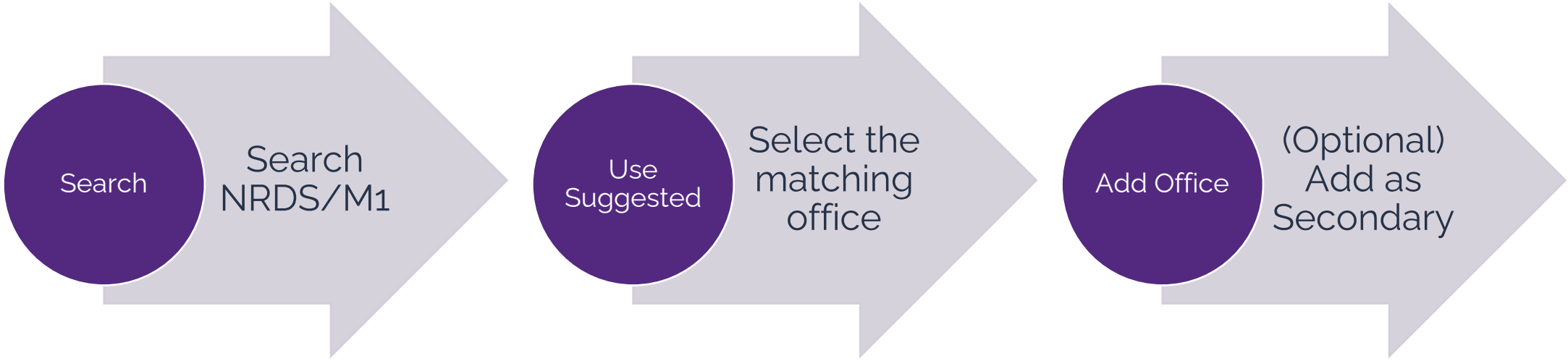
Add an Existing Office

If an Office already exists in NRDS/M1, you can add this office to your database. For example, an agent wishes to join your board and per rules they must be associated to an office, which does not exist in your database.



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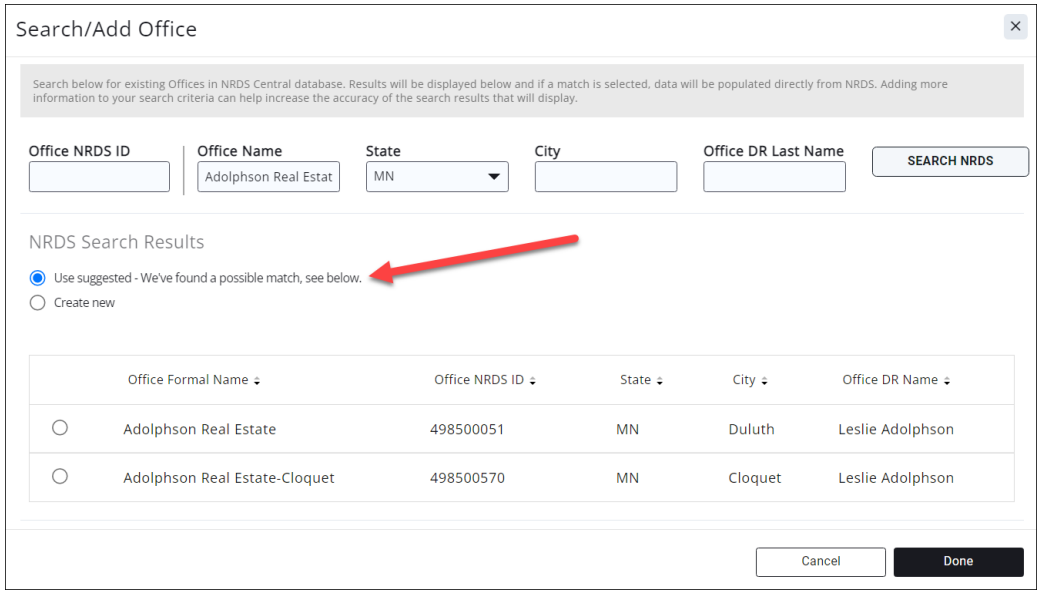
Search NRDS/M1 for Existing Office



Search NRDS/M1! If the office already has a NRDS/M1 ID and exists, you will be able to pull over data that is already available in NRDS/M1. If you have the office NRDS/M1 ID or the Office DR Name, this is the easiest way to search

KB: Search NRDS/M1 Database for Office

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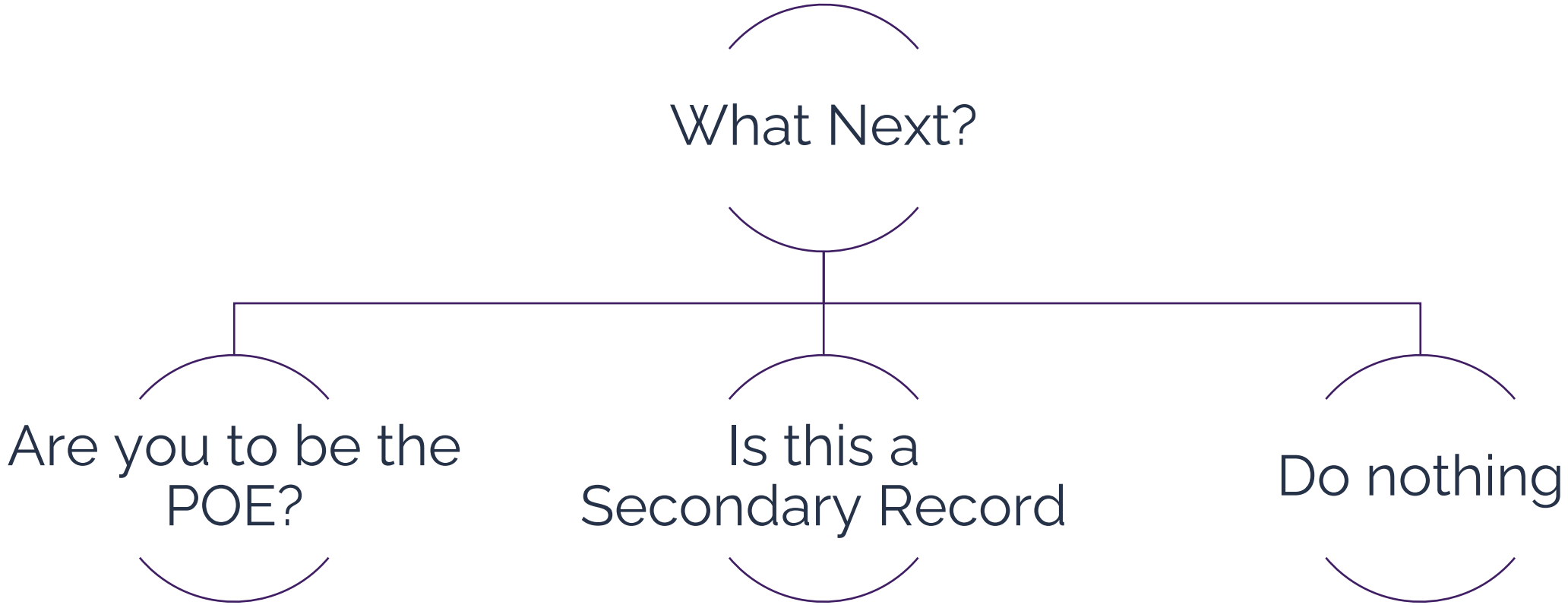
Existing Office



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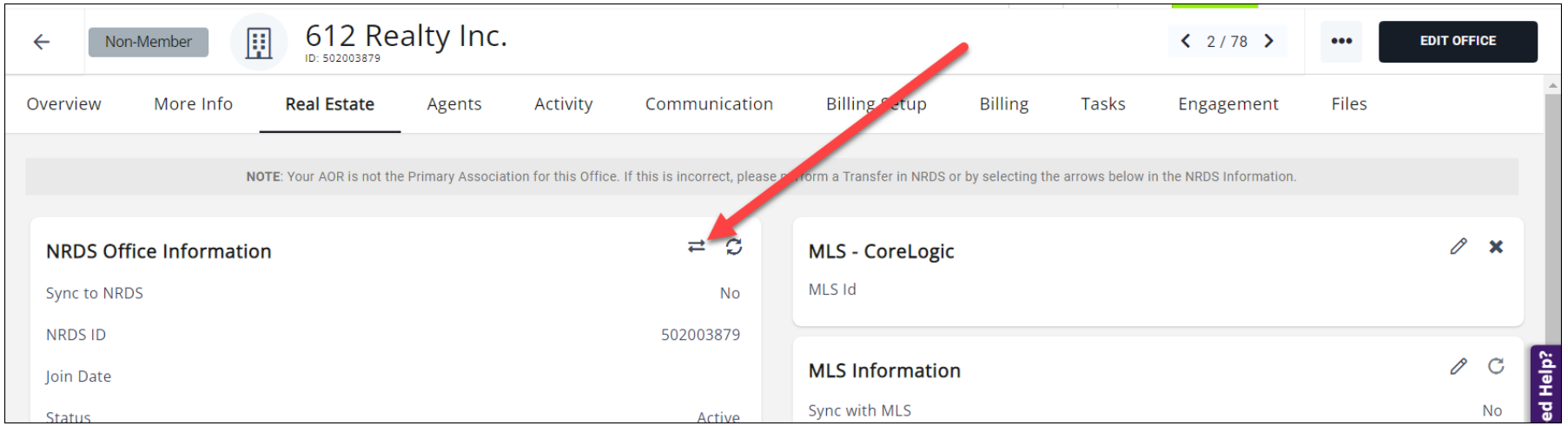
Are you to be the POE? Transfer an Office

- ✓ The POE requesting the TRANSFER must be the POE of the new Association
- ✓ KB: Transfer an Office



Transfer an Office

If an error occurs in processing, this will be displayed immediately on the screen

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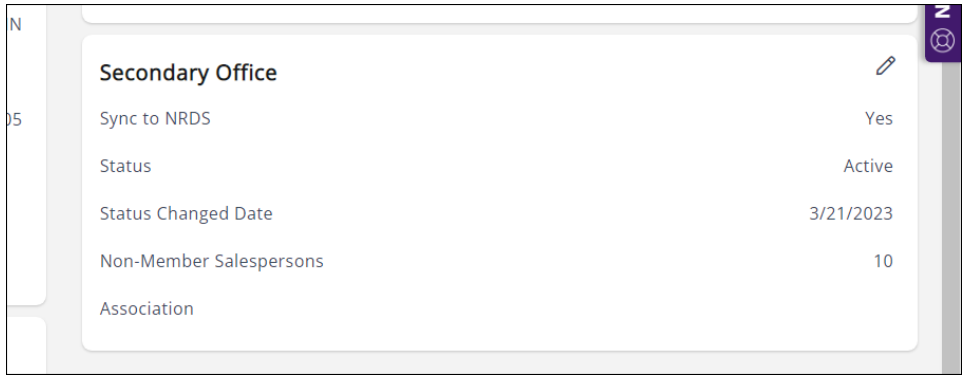
Add as Secondary Office

- The primary association field, in NRDS/M1, indicates which association first added this office.
- If your association also needs to be associated with this office because you have agents linked there, you can add these with via your GrowthZone software, and the supplemental data will be synchronized to NRDS/M1
- KB: Add Secondary Office



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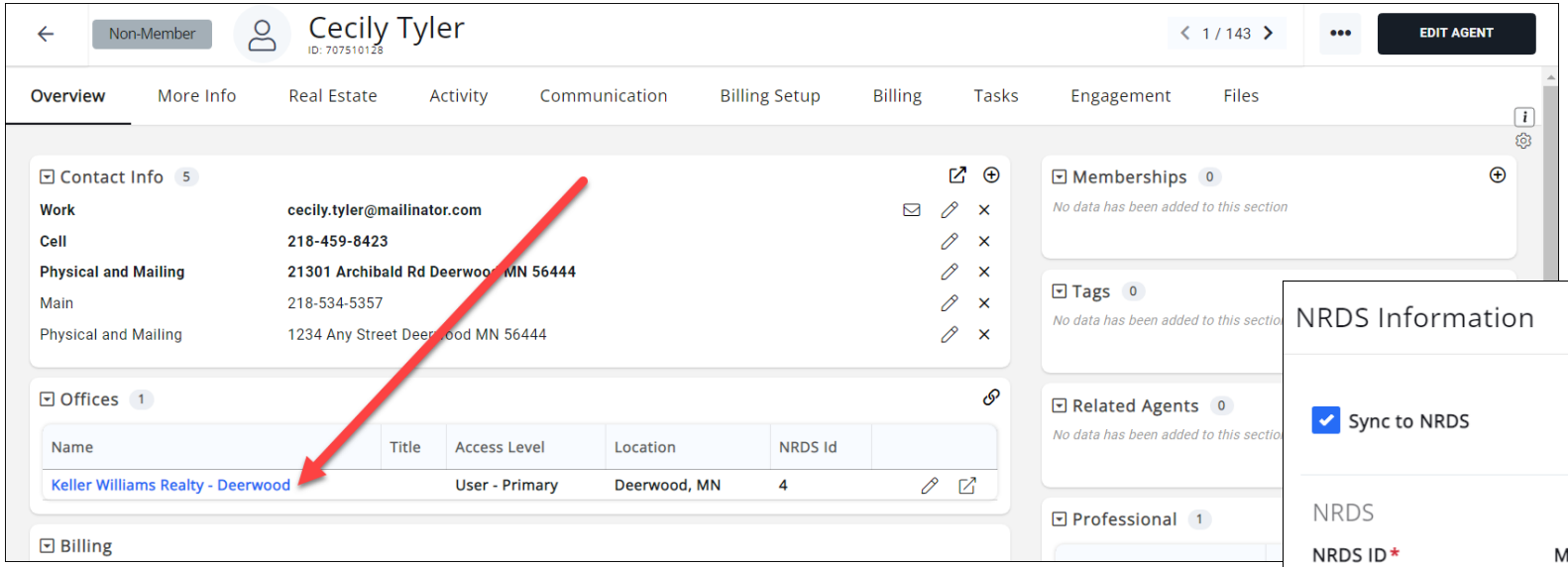
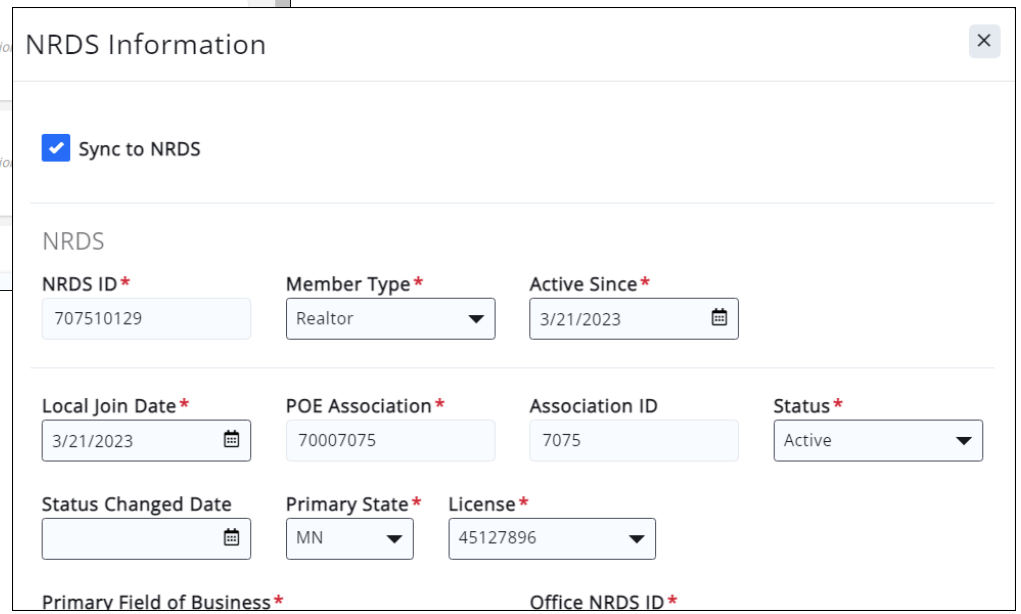
Activate a new Agent





IMPORTANT! Adding a membership (on the profile tab) does NOT make the agent active in NRDS/M1!

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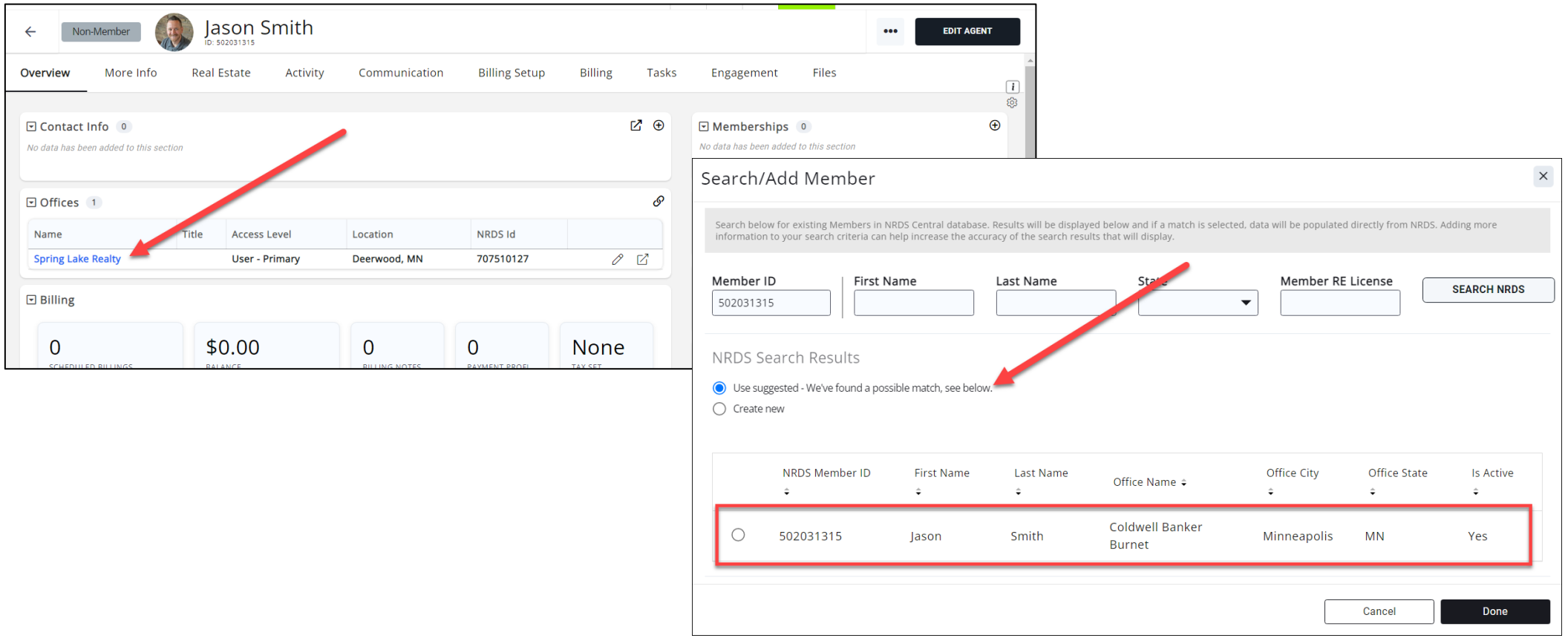
Add an Existing Agent



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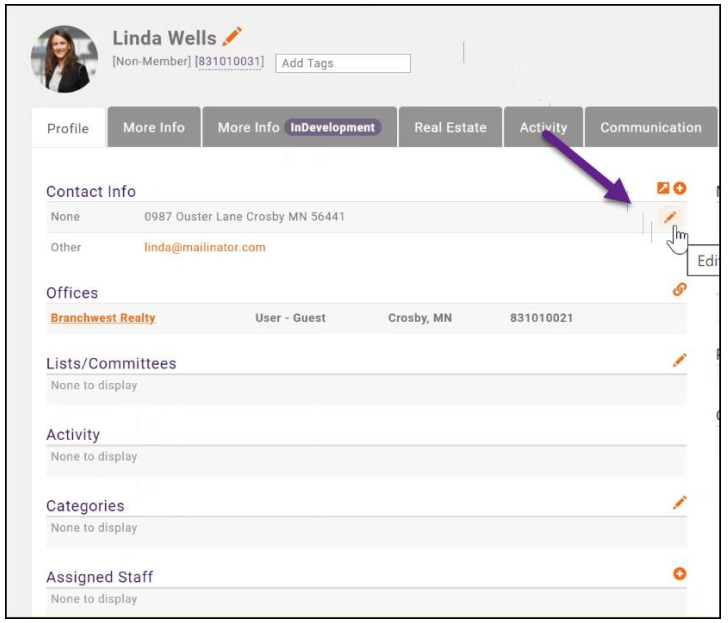
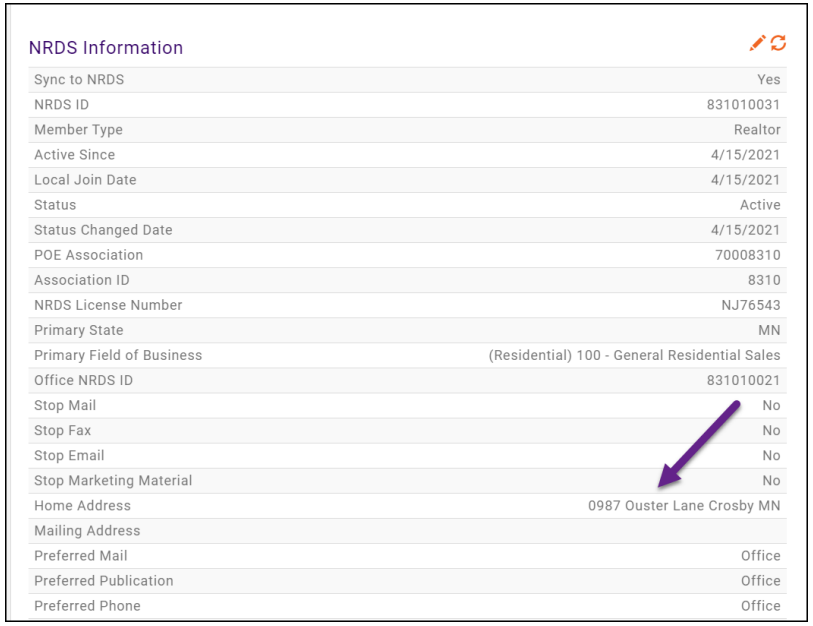
Change an Agent/Office Contact Information

Contact information on the agent's Profile tab may automatically update NRDS/M1 data

KB: Change or Update Agent Information





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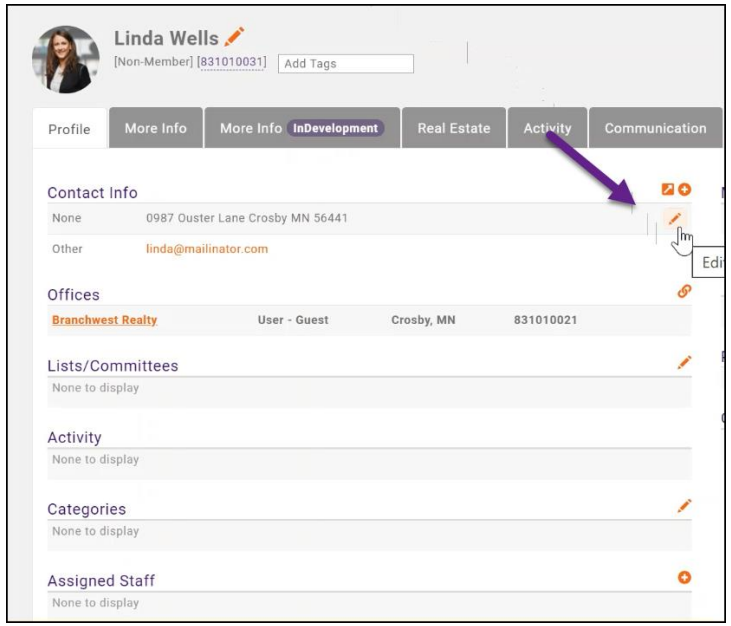
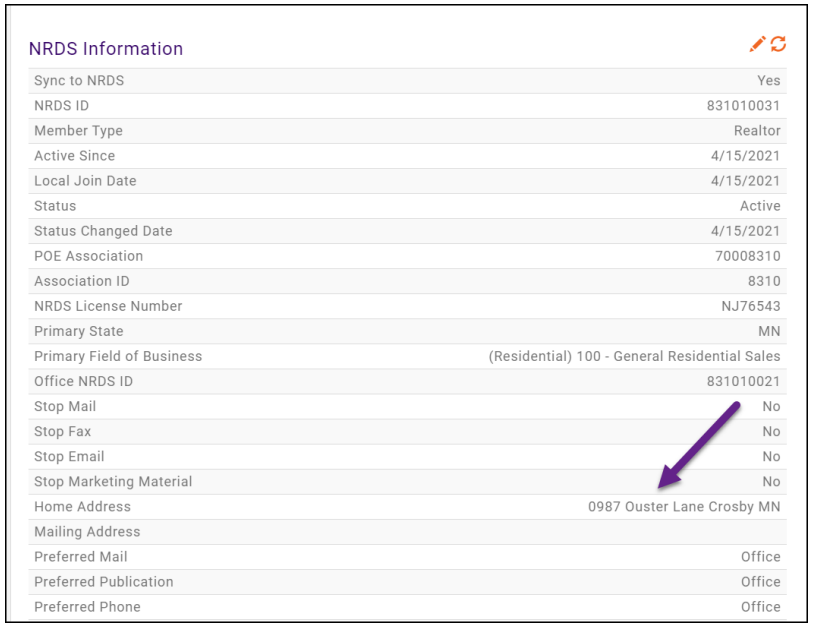
Change an Agent/Office Contact Information

If contact information tied to NRDS/M1 information is “edited”, the edits will be reflected in the NRDS/M1 information.

If you are adding new information, the system will not assume that this information should be changed in NRDS/M1





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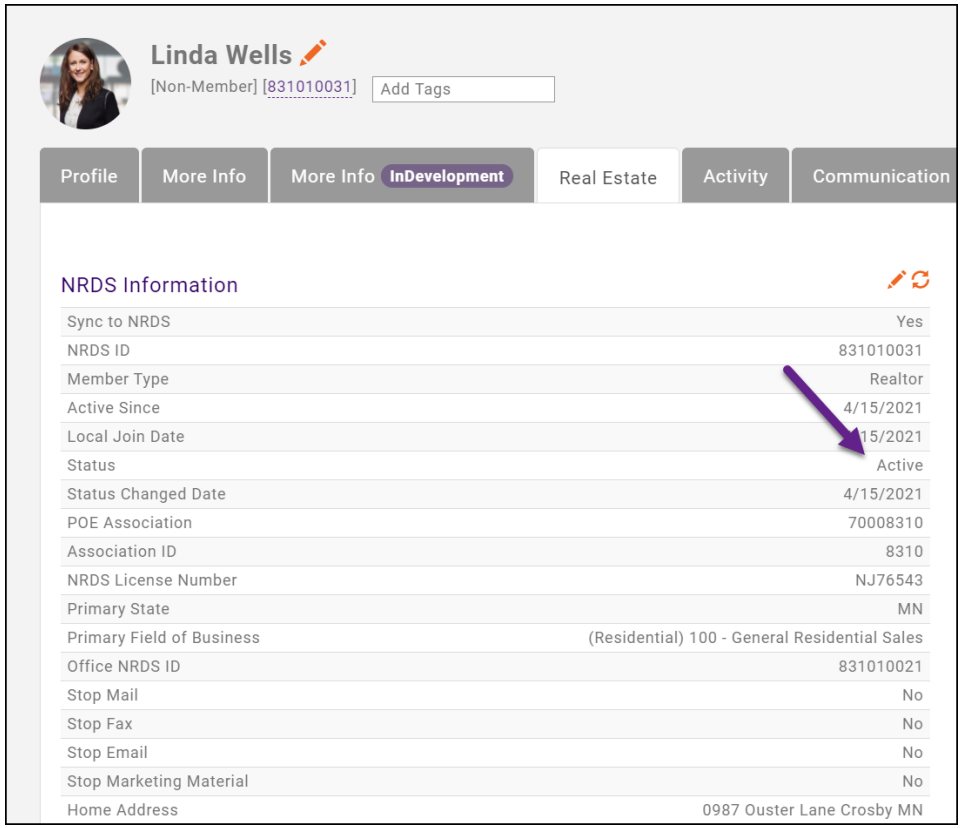
Drop/Inactivate an Agent Membership

1. On the agent's profile tab, drop the membership
2. On the agent's Real Estate tab, inactivate the Agent

Note: If you have setup rules for membership status (Setup > Membership Settings), NRDS/M1 can be automatically updated based on Membership Status

KB: Link Membership Status to NRDS/M1 Status



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Membership Rules

The system can automatically update an agents status if you have defined membership rules

KB: Tie Membership Status to NRDS/M1, MLS, Lockbox Status Rules

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Inactivate an Office

An office can only be inactivated if there are no active agents associated to it.

1. Inactivate or move the agents to new office. Ensure that the designated realtor for the offices is not moved, simply inactivated as the office record cannot be sent over withour a DR
2. Change the status of the office to inactive and sync with M1
3. Turn off the sync to NRDS/M1, and remove the DR if needed

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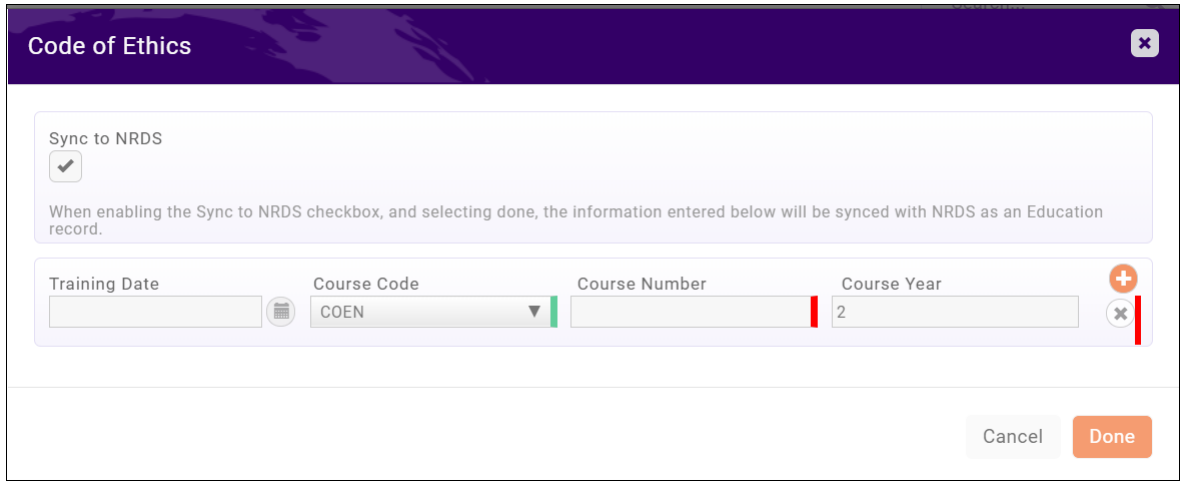
NRDS/M1 Education Records

GrowthZone currently provides the ability to track agent's Code of Ethics (COE) training. You do not need to be the POE to update an education record

KB: Add Update Code of Ethics Training



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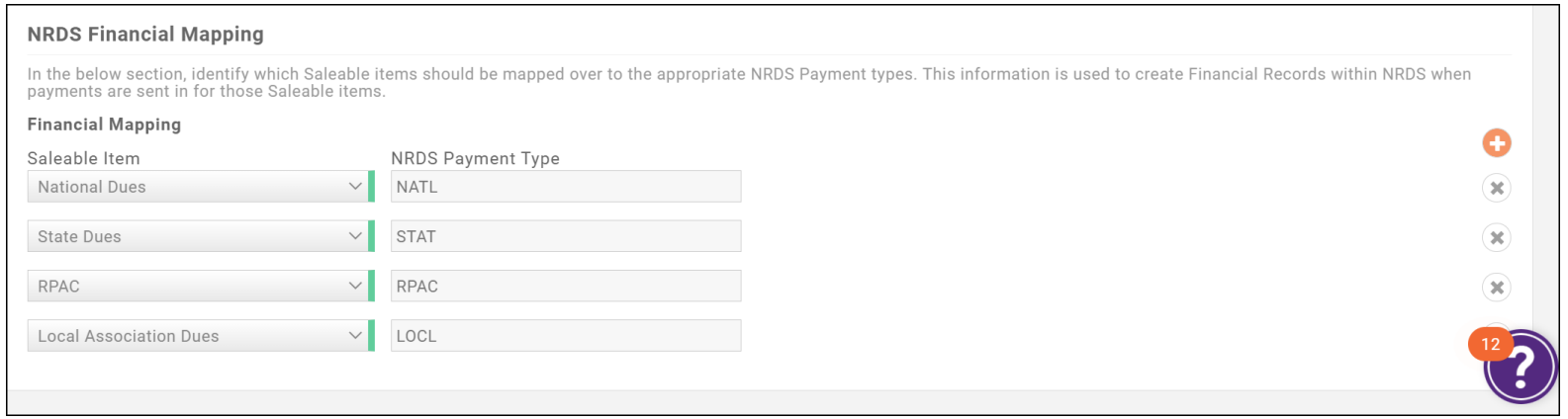
Financial Record Setup

- ✓ GrowthZone will enable the Financial Record sync for you
- ✓ During on-boarding you will be asked if you wish to send financial records. If you have been syncing these records in some fashion (perhaps via file) in the past, the sync should be enabled, as we do not currently have the ability to retrieve the financial records if the initial setup has not been completed

Financial Record Setup

- ✓ GrowthZone relies on the mapping of Goods & Services to specific “Payment Types”
- ✓ In order to get the payment type to be included in the sync, we need to be able to identify what purchase items should be mapped to a particular purchase type



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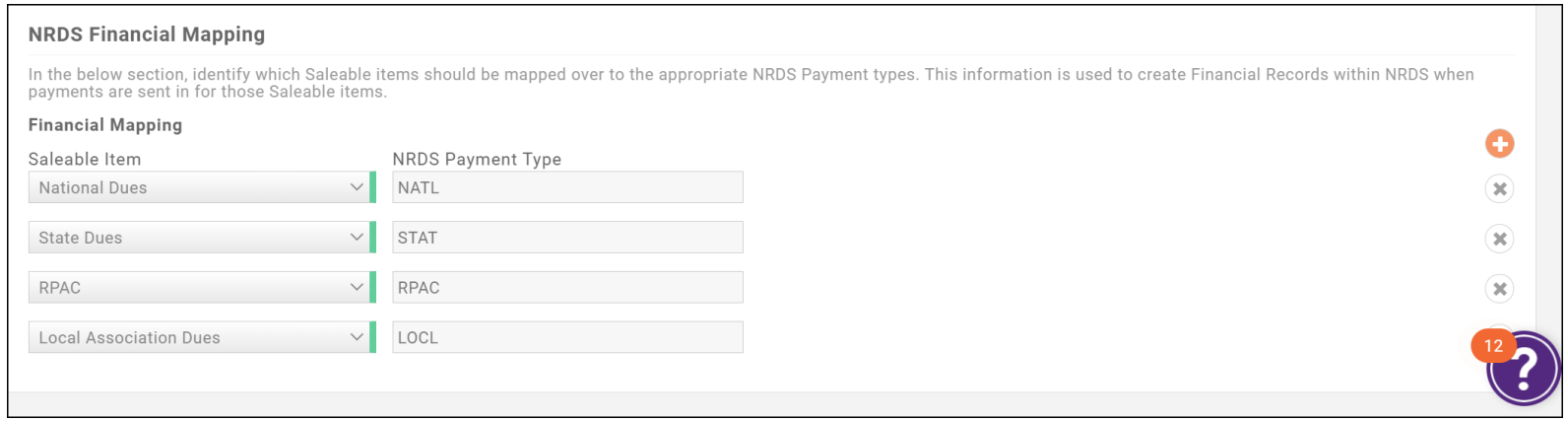
Setup

The Goods & Services mapped are those that reflect the Financial Records that you wish (or are required) to send to NRDS/M1. If you are not certain what information is to be sent, refer to your state bylaws

NOTE: NAR Ecommerce is NOT required to send over financial records



Setup

The NRDS/M1 Standard Payment Types:

- NATL: NAR dues
- IMAG: NAR's Ad Campaign assessment
- STAT: State dues
- LOCL: local dues
- RPAC: RPAC
- LATE: Late Fee

If you are in a state where the state association requires you add the Financial records into NRDS/M1, such as California, you should check with your state for the full list of acceptable Payment Types

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Business Rules

Follow the Rules!

- National dues can only be sent once a year (associations are not supposed to allow them to be paid monthly and NRDS/M1 will not accept monthly reported National dues payments), on the date they are paid. Other dues, such as state and local, can be sent monthly, quarterly, or yearly, on the date they are paid
- GrowthZone will track if dues are paid late, and report to NRDS/M1 accordingly
- You cannot change or delete an existing Financial record. Similar to an accounting general ledger entry, once it is posted you cannot delete it

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Business Rules

- NRDS/M1 will not accept a Financial record for an **inactive** member. The member's status must be A, P or S in M1
- M1 will also check that the Office ID is an active office in M1 and that the member is a member of the association in the Primary Association ID field
- A Billing Year is sent with the records. If an association bills their members for the upcoming year's dues in advance, the Billing Year that is sent, uses the Invoice Date or Activation Date, which ever is later, to determine the Billing Year

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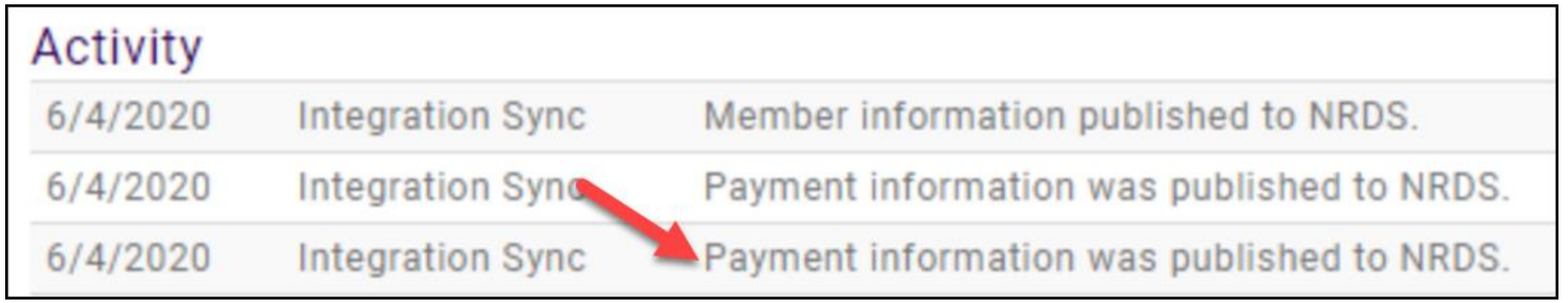
Business Rules

With the proper setup, and the sync enabled, with no further interaction on your part when a payment is received for one of the mapped items, the record will be sent to NRDS/M1 within 10 minutes



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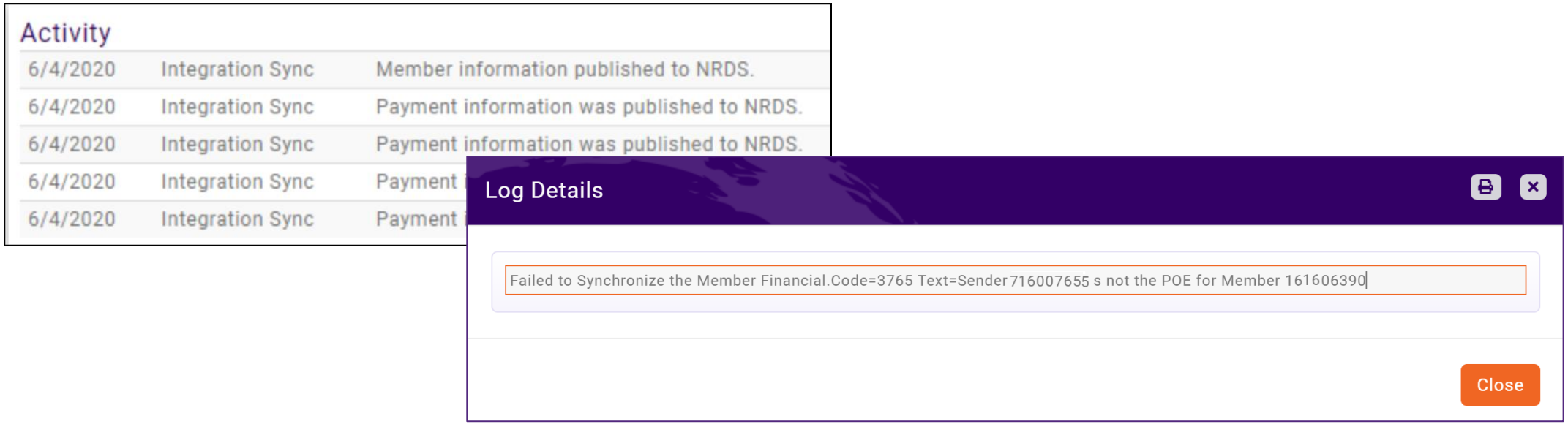
Errors

M1 Errors and validation warnings are visible on a member's Activity tab, and in the Event Log. KB: Review NRDS/M1 Event Log



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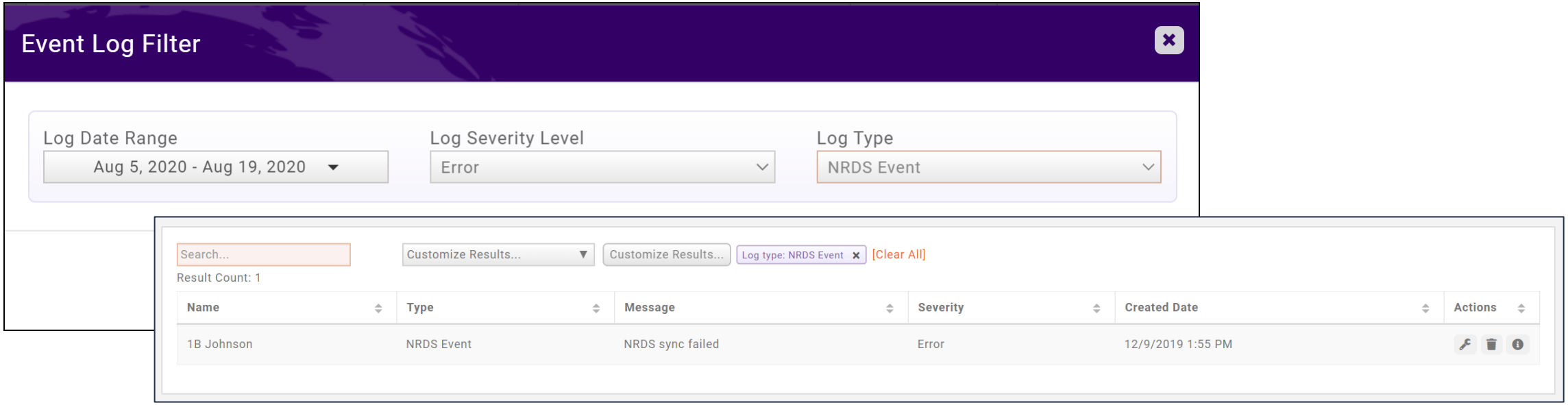
Review the Event Log

Issues identified during synchronization may be visible in the event log. Most events are generated because of malformed or missing information



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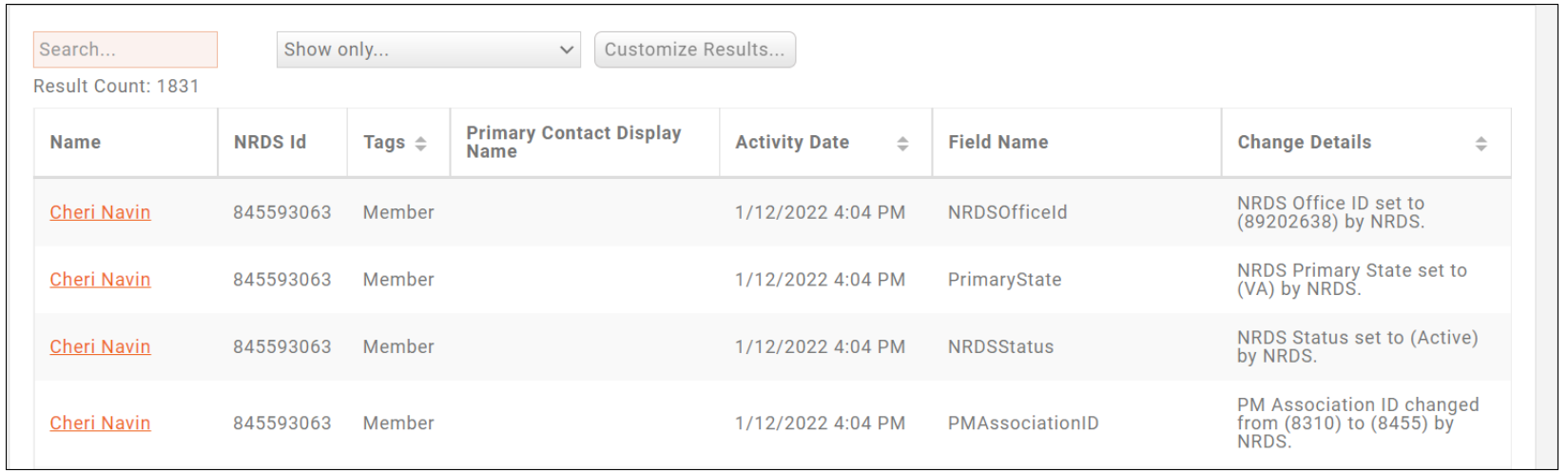
Review Updates Received from NRDS/M1 Log

On each agent or office Activity tab, any changes will be logged. In addition, you can use the Updates Received from NRDS/M1 report to review all activity over a specific date range

KB: Updates Received from NRDS/M1



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Questions?

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Training and Support

Customer Service Hours:

Phone: 7 a.m. – 5 p.m. CT (Monday, Tuesday, Thursday, and Friday)
800.825.9171, Option 4, then Option 2

Chat: 7 a.m. – 6:45 p.m. CT (Monday, Tuesday, and Thursday)
7 a.m. – 4:45 p.m. CT (Friday)

Online Support Documentation: GrowthZone Knowledge Base »

Online Training Calendar: Training Event Calendar »

Live Chat: GrowthZone Support Portal (chat on far right) »

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